

Global High Voltage DC Power Distribution Units for AI Data Centers Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global High Voltage DC Power Distribution Units for AI Data Centers market size is expected to reach \$ 1282 million by 2032, rising at a market growth of 10.6% CAGR during the forecast period (2026-2032).

High Voltage DC Power Distribution Units for AI Data Centers are critical power supply and distribution equipment designed for high-power GPU server clusters, liquid-cooled AI racks, supercomputing centers, and cloud data centers. Their core role is to establish a higher-voltage DC distribution path between traditional AC power input, rectifier modules, energy storage backup units, and server racks, thereby reducing cable losses, copper consumption, conversion losses, and cabinet space pressure caused by high-current transmission. These products are commonly delivered as power sidecars, DC distribution cabinets, rack busbars, output protection and control modules, integrated rectifier and distribution systems, or rack-level DC distribution strips. Typical voltage systems include 240 V, 336 V, 380 V, 400 V, and 800 V. Key functions include AC input connection, DC rectification, busbar aggregation, branch output, fuse or circuit-breaker protection, output switching, hot-swap maintenance, energy metering, status telemetry, short-term backup integration, and remote management. As AI server rack power moves from tens of kilowatts toward hundreds of kilowatts and even megawatt levels, traditional low-voltage DC and multi-stage AC conversion architectures face bottlenecks in efficiency, space utilization, thermal management, and operations. By raising distribution voltage, reducing conversion stages, strengthening protection and control, and supporting modular expansion, high-voltage DC power distribution units provide AI data centers with higher power density, lower losses, faster deployment, and stronger maintainability.

The power system of AI data centers is gradually shifting from traditional AC distribution and low-voltage DC architecture toward high-voltage DC distribution designed for high-density racks. The fundamental driver is the rapid increase in per-rack power for GPU clusters and accelerated computing platforms. Existing multi-stage AC conversion, low-voltage high-current transmission, and distributed rack power delivery methods are facing growing pressure in copper consumption, cabling space, conversion losses, thermal management, and maintenance complexity. High-voltage DC power distribution units raise the distribution voltage to levels such as 240 V, 336 V, 380 V, 400 V, or 800 V, significantly reducing transmission current at the same power level and providing a unified platform for DC busbars, output protection, intelligent metering, and backup power integration. As open standards, GPU platform roadmaps, and hyperscale data center construction cycles become more aligned, power sidecars, DC busbars, output protection and control modules, and rack-level distribution units will become important components of AI computing infrastructure.

Industry competition will evolve along two parallel paths. One path is the 800 VDC ecosystem for future megawatt-scale AI racks, emphasizing high-voltage DC sidecars, modular power shelves, solid-state or fast protection devices, energy storage integration, remote telemetry, and system-level safety validation. This path mainly serves newly built large-scale AI data centers and next-generation GPU platforms. The other path targets existing telecom facilities, intelligent computing centers, supercomputing centers, and large data centers using 240 V, 336 V, and 380 V DC power systems, with a stronger focus on reliability, engineering maturity, domestic supply, maintenance convenience, and retrofit deployment. The competitive barriers of the former lie in standards participation, platform collaboration, and high-voltage protection technologies, while those of the latter lie in long-term project references, customer operation systems, and local delivery capabilities. These two paths are not mutually exclusive; instead, they jointly drive higher penetration of DC power supply across different construction phases, customer budgets, and power-density requirements.

Looking ahead, high-voltage DC power distribution units will no longer be merely a technical upgrade of data center distribution cabinets. They will become a key lever for improving energy efficiency, scalability, and deployment speed in AI data centers. AI training clusters require high power density, continuous power supply, and rapid deployment, which means power distribution systems must be deeply integrated with liquid cooling, energy storage, busbars, intelligent operations, and modular construction. Future customers will pay more attention to system efficiency, output capacity, hot-swap safety, fault isolation, online monitoring, backup compatibility, and expansion

convenience rather than simply comparing the price of a single device. As AI computing centers expand from a limited number of hyperscale projects to regional, industry-level, and enterprise-level applications, companies with high-voltage DC distribution, engineering integration, protection control, and lifecycle service capabilities will continue to gain opportunities in both new high-density facilities and retrofit projects for existing data centers.

This report studies the global High Voltage DC Power Distribution Units for AI Data Centers production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for High Voltage DC Power Distribution Units for AI Data Centers and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of High Voltage DC Power Distribution Units for AI Data Centers that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global High Voltage DC Power Distribution Units for AI Data Centers total production and demand, 2021-2032, (Units)

Global High Voltage DC Power Distribution Units for AI Data Centers total production value, 2021-2032, (USD Million)

Global High Voltage DC Power Distribution Units for AI Data Centers production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global High Voltage DC Power Distribution Units for AI Data Centers consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: High Voltage DC Power Distribution Units for AI Data Centers domestic production, consumption, key domestic manufacturers and share

Global High Voltage DC Power Distribution Units for AI Data Centers production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global High Voltage DC Power Distribution Units for AI Data Centers production by Rated Voltage, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global High Voltage DC Power Distribution Units for AI Data Centers production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global High Voltage DC Power Distribution Units for AI Data Centers market based on the following parameters - company overview,

production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Flex Ltd., Vertiv Group Corp., ABB Ltd, Schneider Electric SE, Eaton Corporation plc, Delta Electronics, Inc., LITE-ON Technology Corporation, Kehua Data Co., Ltd., Hangzhou Zhongheng Electric Co., Ltd., East Group Co., Ltd., etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World High Voltage DC Power Distribution Units for AI Data Centers market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Units) and average price (US\$/Unit) by manufacturer, by Rated Voltage, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global High Voltage DC Power Distribution Units for AI Data Centers Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global High Voltage DC Power Distribution Units for AI Data Centers Market,
Segmentation by Rated Voltage:

240 V

336 V

380 V

800 V

Global High Voltage DC Power Distribution Units for AI Data Centers Market,
Segmentation by Output Capacity:

Below 100 kW

100 kW to 400 kW

400 kW to 1 MW

Above 1 MW

Global High Voltage DC Power Distribution Units for AI Data Centers Market,
Segmentation by Installation Position:

Room

Row

Sidocar

Rack

Global High Voltage DC Power Distribution Units for AI Data Centers Market,

Global High Voltage DC Power Distribution Units for AI Data Centers Supply, Demand and Key Producers, 2026-203...

Segmentation by Application:

AI Training Cluster Power Supply

AI Inference Cluster Power Supply

Cloud Data Center Power Supply

Telecom Equipment Room Power Supply

Others

Companies Profiled:

Flex Ltd.

Vertiv Group Corp.

ABB Ltd

Schneider Electric SE

Eaton Corporation plc

Delta Electronics, Inc.

LITE-ON Technology Corporation

Kehua Data Co., Ltd.

Hangzhou Zhongheng Electric Co., Ltd.

East Group Co., Ltd.

Huawei Digital Power Technologies Co., Ltd.

NTT FACILITIES, INC.

Key Questions Answered:

1. How big is the global High Voltage DC Power Distribution Units for AI Data Centers market?
2. What is the demand of the global High Voltage DC Power Distribution Units for AI Data Centers market?
3. What is the year over year growth of the global High Voltage DC Power Distribution Units for AI Data Centers market?
4. What is the production and production value of the global High Voltage DC Power Distribution Units for AI Data Centers market?
5. Who are the key producers in the global High Voltage DC Power Distribution Units for AI Data Centers market?
6. What are the growth factors driving the market demand?

Contents

1 SUPPLY SUMMARY

1.1 High Voltage DC Power Distribution Units for AI Data Centers Introduction

1.2 World High Voltage DC Power Distribution Units for AI Data Centers Supply & Forecast

1.2.1 World High Voltage DC Power Distribution Units for AI Data Centers Production Value (2021 & 2025 & 2032)

1.2.2 World High Voltage DC Power Distribution Units for AI Data Centers Production (2021-2032)

1.2.3 World High Voltage DC Power Distribution Units for AI Data Centers Pricing Trends (2021-2032)

1.3 World High Voltage DC Power Distribution Units for AI Data Centers Production by Region (Based on Production Site)

1.3.1 World High Voltage DC Power Distribution Units for AI Data Centers Production Value by Region (2021-2032)

1.3.2 World High Voltage DC Power Distribution Units for AI Data Centers Production by Region (2021-2032)

1.3.3 World High Voltage DC Power Distribution Units for AI Data Centers Average Price by Region (2021-2032)

1.3.4 North America High Voltage DC Power Distribution Units for AI Data Centers Production (2021-2032)

1.3.5 Europe High Voltage DC Power Distribution Units for AI Data Centers Production (2021-2032)

1.3.6 China High Voltage DC Power Distribution Units for AI Data Centers Production (2021-2032)

1.3.7 Japan High Voltage DC Power Distribution Units for AI Data Centers Production (2021-2032)

1.3.8 South Korea High Voltage DC Power Distribution Units for AI Data Centers Production (2021-2032)

1.3.9 Southeast Asia High Voltage DC Power Distribution Units for AI Data Centers Production (2021-2032)

1.3.10 China Taiwan High Voltage DC Power Distribution Units for AI Data Centers Production (2021-2032)

1.4 Market Drivers, Restraints and Trends

1.4.1 High Voltage DC Power Distribution Units for AI Data Centers Market Drivers

1.4.2 Factors Affecting Demand

1.4.3 High Voltage DC Power Distribution Units for AI Data Centers Major Market

Trends

2 DEMAND SUMMARY

2.1 World High Voltage DC Power Distribution Units for AI Data Centers Demand (2021-2032)

2.2 World High Voltage DC Power Distribution Units for AI Data Centers Consumption by Region

2.2.1 World High Voltage DC Power Distribution Units for AI Data Centers Consumption by Region (2021-2026)

2.2.2 World High Voltage DC Power Distribution Units for AI Data Centers Consumption Forecast by Region (2027-2032)

2.3 United States High Voltage DC Power Distribution Units for AI Data Centers Consumption (2021-2032)

2.4 China High Voltage DC Power Distribution Units for AI Data Centers Consumption (2021-2032)

2.5 Europe High Voltage DC Power Distribution Units for AI Data Centers Consumption (2021-2032)

2.6 Japan High Voltage DC Power Distribution Units for AI Data Centers Consumption (2021-2032)

2.7 South Korea High Voltage DC Power Distribution Units for AI Data Centers Consumption (2021-2032)

2.8 ASEAN High Voltage DC Power Distribution Units for AI Data Centers Consumption (2021-2032)

2.9 India High Voltage DC Power Distribution Units for AI Data Centers Consumption (2021-2032)

3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

3.1 World High Voltage DC Power Distribution Units for AI Data Centers Production Value by Manufacturer (2021-2026)

3.2 World High Voltage DC Power Distribution Units for AI Data Centers Production by Manufacturer (2021-2026)

3.3 World High Voltage DC Power Distribution Units for AI Data Centers Average Price by Manufacturer (2021-2026)

3.4 High Voltage DC Power Distribution Units for AI Data Centers Company Evaluation Quadrant

3.5 Industry Rank and Concentration Rate (CR)

3.5.1 Global High Voltage DC Power Distribution Units for AI Data Centers Industry

Rank of Major Manufacturers

3.5.2 Global Concentration Ratios (CR4) for High Voltage DC Power Distribution Units for AI Data Centers in 2025

3.5.3 Global Concentration Ratios (CR8) for High Voltage DC Power Distribution Units for AI Data Centers in 2025

3.6 High Voltage DC Power Distribution Units for AI Data Centers Market: Overall Company Footprint Analysis

3.6.1 High Voltage DC Power Distribution Units for AI Data Centers Market: Region Footprint

3.6.2 High Voltage DC Power Distribution Units for AI Data Centers Market: Company Product Type Footprint

3.6.3 High Voltage DC Power Distribution Units for AI Data Centers Market: Company Product Application Footprint

3.7 Competitive Environment

3.7.1 Historical Structure of the Industry

3.7.2 Barriers of Market Entry

3.7.3 Factors of Competition

3.8 New Entrant and Capacity Expansion Plans

3.9 Mergers, Acquisition, Agreements, and Collaborations

4 UNITED STATES VS CHINA VS REST OF THE WORLD

4.1 United States VS China: High Voltage DC Power Distribution Units for AI Data Centers Production Value Comparison

4.1.1 United States VS China: High Voltage DC Power Distribution Units for AI Data Centers Production Value Comparison (2021 & 2025 & 2032)

4.1.2 United States VS China: High Voltage DC Power Distribution Units for AI Data Centers Production Value Market Share Comparison (2021 & 2025 & 2032)

4.2 United States VS China: High Voltage DC Power Distribution Units for AI Data Centers Production Comparison

4.2.1 United States VS China: High Voltage DC Power Distribution Units for AI Data Centers Production Comparison (2021 & 2025 & 2032)

4.2.2 United States VS China: High Voltage DC Power Distribution Units for AI Data Centers Production Market Share Comparison (2021 & 2025 & 2032)

4.3 United States VS China: High Voltage DC Power Distribution Units for AI Data Centers Consumption Comparison

4.3.1 United States VS China: High Voltage DC Power Distribution Units for AI Data Centers Consumption Comparison (2021 & 2025 & 2032)

4.3.2 United States VS China: High Voltage DC Power Distribution Units for AI Data

Centers Consumption Market Share Comparison (2021 & 2025 & 2032)

4.4 United States Based High Voltage DC Power Distribution Units for AI Data Centers Manufacturers and Market Share, 2021-2026

4.4.1 United States Based High Voltage DC Power Distribution Units for AI Data Centers Manufacturers, Headquarters and Production Site (States, Country)

4.4.2 United States Based Manufacturers High Voltage DC Power Distribution Units for AI Data Centers Production Value (2021-2026)

4.4.3 United States Based Manufacturers High Voltage DC Power Distribution Units for AI Data Centers Production (2021-2026)

4.5 China Based High Voltage DC Power Distribution Units for AI Data Centers Manufacturers and Market Share

4.5.1 China Based High Voltage DC Power Distribution Units for AI Data Centers Manufacturers, Headquarters and Production Site (Province, Country)

4.5.2 China Based Manufacturers High Voltage DC Power Distribution Units for AI Data Centers Production Value (2021-2026)

4.5.3 China Based Manufacturers High Voltage DC Power Distribution Units for AI Data Centers Production (2021-2026)

4.6 Rest of World Based High Voltage DC Power Distribution Units for AI Data Centers Manufacturers and Market Share, 2021-2026

4.6.1 Rest of World Based High Voltage DC Power Distribution Units for AI Data Centers Manufacturers, Headquarters and Production Site (State, Country)

4.6.2 Rest of World Based Manufacturers High Voltage DC Power Distribution Units for AI Data Centers Production Value (2021-2026)

4.6.3 Rest of World Based Manufacturers High Voltage DC Power Distribution Units for AI Data Centers Production (2021-2026)

5 MARKET ANALYSIS BY RATED VOLTAGE

5.1 World High Voltage DC Power Distribution Units for AI Data Centers Market Size Overview by Rated Voltage: 2021 VS 2025 VS 2032

5.2 Segment Introduction by Rated Voltage

5.2.1 240 V

5.2.2 336 V

5.2.3 380 V

5.2.4 800 V

5.3 Market Segment by Rated Voltage

5.3.1 World High Voltage DC Power Distribution Units for AI Data Centers Production by Rated Voltage (2021-2032)

5.3.2 World High Voltage DC Power Distribution Units for AI Data Centers Production

Value by Rated Voltage (2021-2032)

5.3.3 World High Voltage DC Power Distribution Units for AI Data Centers Average Price by Rated Voltage (2021-2032)

6 MARKET ANALYSIS BY OUTPUT CAPACITY

6.1 World High Voltage DC Power Distribution Units for AI Data Centers Market Size Overview by Output Capacity: 2021 VS 2025 VS 2032

6.2 Segment Introduction by Output Capacity

6.2.1 Below 100 kW

6.2.2 100 kW to 400 kW

6.2.3 400 kW to 1 MW

6.2.4 Above 1 MW

6.3 Market Segment by Output Capacity

6.3.1 World High Voltage DC Power Distribution Units for AI Data Centers Production by Output Capacity (2021-2032)

6.3.2 World High Voltage DC Power Distribution Units for AI Data Centers Production Value by Output Capacity (2021-2032)

6.3.3 World High Voltage DC Power Distribution Units for AI Data Centers Average Price by Output Capacity (2021-2032)

7 MARKET ANALYSIS BY INSTALLATION POSITION

7.1 World High Voltage DC Power Distribution Units for AI Data Centers Market Size Overview by Installation Position: 2021 VS 2025 VS 2032

7.2 Segment Introduction by Installation Position

7.2.1 Room

7.2.2 Row

7.2.3 Sidecar

7.2.4 Rack

7.3 Market Segment by Installation Position

7.3.1 World High Voltage DC Power Distribution Units for AI Data Centers Production by Installation Position (2021-2032)

7.3.2 World High Voltage DC Power Distribution Units for AI Data Centers Production Value by Installation Position (2021-2032)

7.3.3 World High Voltage DC Power Distribution Units for AI Data Centers Average Price by Installation Position (2021-2032)

8 MARKET ANALYSIS BY APPLICATION

8.1 World High Voltage DC Power Distribution Units for AI Data Centers Market Size
Overview by Application: 2021 VS 2025 VS 2032

8.2 Segment Introduction by Application

8.2.1 AI Training Cluster Power Supply

8.2.2 AI Inference Cluster Power Supply

8.2.3 Cloud Data Center Power Supply

8.2.4 Telecom Equipment Room Power Supply

8.2.5 Others

8.3 Market Segment by Application

8.3.1 World High Voltage DC Power Distribution Units for AI Data Centers Production
by Application (2021-2032)

8.3.2 World High Voltage DC Power Distribution Units for AI Data Centers Production
Value by Application (2021-2032)

8.3.3 World High Voltage DC Power Distribution Units for AI Data Centers Average
Price by Application (2021-2032)

9 COMPANY PROFILES

9.1 Flex Ltd.

9.1.1 Flex Ltd. Details

9.1.2 Flex Ltd. Major Business

9.1.3 Flex Ltd. High Voltage DC Power Distribution Units for AI Data Centers Product
and Services

9.1.4 Flex Ltd. High Voltage DC Power Distribution Units for AI Data Centers
Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.1.5 Flex Ltd. Recent Developments/Updates

9.1.6 Flex Ltd. Competitive Strengths & Weaknesses

9.2 Vertiv Group Corp.

9.2.1 Vertiv Group Corp. Details

9.2.2 Vertiv Group Corp. Major Business

9.2.3 Vertiv Group Corp. High Voltage DC Power Distribution Units for AI Data Centers
Product and Services

9.2.4 Vertiv Group Corp. High Voltage DC Power Distribution Units for AI Data Centers
Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.2.5 Vertiv Group Corp. Recent Developments/Updates

9.2.6 Vertiv Group Corp. Competitive Strengths & Weaknesses

9.3 ABB Ltd

9.3.1 ABB Ltd Details

- 9.3.2 ABB Ltd Major Business
- 9.3.3 ABB Ltd High Voltage DC Power Distribution Units for AI Data Centers Product and Services
- 9.3.4 ABB Ltd High Voltage DC Power Distribution Units for AI Data Centers Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.3.5 ABB Ltd Recent Developments/Updates
- 9.3.6 ABB Ltd Competitive Strengths & Weaknesses
- 9.4 Schneider Electric SE
 - 9.4.1 Schneider Electric SE Details
 - 9.4.2 Schneider Electric SE Major Business
 - 9.4.3 Schneider Electric SE High Voltage DC Power Distribution Units for AI Data Centers Product and Services
 - 9.4.4 Schneider Electric SE High Voltage DC Power Distribution Units for AI Data Centers Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.4.5 Schneider Electric SE Recent Developments/Updates
 - 9.4.6 Schneider Electric SE Competitive Strengths & Weaknesses
- 9.5 Eaton Corporation plc
 - 9.5.1 Eaton Corporation plc Details
 - 9.5.2 Eaton Corporation plc Major Business
 - 9.5.3 Eaton Corporation plc High Voltage DC Power Distribution Units for AI Data Centers Product and Services
 - 9.5.4 Eaton Corporation plc High Voltage DC Power Distribution Units for AI Data Centers Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.5.5 Eaton Corporation plc Recent Developments/Updates
 - 9.5.6 Eaton Corporation plc Competitive Strengths & Weaknesses
- 9.6 Delta Electronics, Inc.
 - 9.6.1 Delta Electronics, Inc. Details
 - 9.6.2 Delta Electronics, Inc. Major Business
 - 9.6.3 Delta Electronics, Inc. High Voltage DC Power Distribution Units for AI Data Centers Product and Services
 - 9.6.4 Delta Electronics, Inc. High Voltage DC Power Distribution Units for AI Data Centers Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.6.5 Delta Electronics, Inc. Recent Developments/Updates
 - 9.6.6 Delta Electronics, Inc. Competitive Strengths & Weaknesses
- 9.7 LITE-ON Technology Corporation
 - 9.7.1 LITE-ON Technology Corporation Details
 - 9.7.2 LITE-ON Technology Corporation Major Business
 - 9.7.3 LITE-ON Technology Corporation High Voltage DC Power Distribution Units for AI Data Centers Product and Services

9.7.4 LITE-ON Technology Corporation High Voltage DC Power Distribution Units for AI Data Centers Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.7.5 LITE-ON Technology Corporation Recent Developments/Updates

9.7.6 LITE-ON Technology Corporation Competitive Strengths & Weaknesses

9.8 Kehua Data Co., Ltd.

9.8.1 Kehua Data Co., Ltd. Details

9.8.2 Kehua Data Co., Ltd. Major Business

9.8.3 Kehua Data Co., Ltd. High Voltage DC Power Distribution Units for AI Data Centers Product and Services

9.8.4 Kehua Data Co., Ltd. High Voltage DC Power Distribution Units for AI Data Centers Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.8.5 Kehua Data Co., Ltd. Recent Developments/Updates

9.8.6 Kehua Data Co., Ltd. Competitive Strengths & Weaknesses

9.9 Hangzhou Zhongheng Electric Co., Ltd.

9.9.1 Hangzhou Zhongheng Electric Co., Ltd. Details

9.9.2 Hangzhou Zhongheng Electric Co., Ltd. Major Business

9.9.3 Hangzhou Zhongheng Electric Co., Ltd. High Voltage DC Power Distribution Units for AI Data Centers Product and Services

9.9.4 Hangzhou Zhongheng Electric Co., Ltd. High Voltage DC Power Distribution Units for AI Data Centers Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.9.5 Hangzhou Zhongheng Electric Co., Ltd. Recent Developments/Updates

9.9.6 Hangzhou Zhongheng Electric Co., Ltd. Competitive Strengths & Weaknesses

9.10 East Group Co., Ltd.

9.10.1 East Group Co., Ltd. Details

9.10.2 East Group Co., Ltd. Major Business

9.10.3 East Group Co., Ltd. High Voltage DC Power Distribution Units for AI Data Centers Product and Services

9.10.4 East Group Co., Ltd. High Voltage DC Power Distribution Units for AI Data Centers Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.10.5 East Group Co., Ltd. Recent Developments/Updates

9.10.6 East Group Co., Ltd. Competitive Strengths & Weaknesses

9.11 Huawei Digital Power Technologies Co., Ltd.

9.11.1 Huawei Digital Power Technologies Co., Ltd. Details

9.11.2 Huawei Digital Power Technologies Co., Ltd. Major Business

9.11.3 Huawei Digital Power Technologies Co., Ltd. High Voltage DC Power Distribution Units for AI Data Centers Product and Services

9.11.4 Huawei Digital Power Technologies Co., Ltd. High Voltage DC Power Distribution Units for AI Data Centers Production, Price, Value, Gross Margin and

Market Share (2021-2026)

9.11.5 Huawei Digital Power Technologies Co., Ltd. Recent Developments/Updates

9.11.6 Huawei Digital Power Technologies Co., Ltd. Competitive Strengths & Weaknesses

9.12 NTT FACILITIES, INC.

9.12.1 NTT FACILITIES, INC. Details

9.12.2 NTT FACILITIES, INC. Major Business

9.12.3 NTT FACILITIES, INC. High Voltage DC Power Distribution Units for AI Data Centers Product and Services

9.12.4 NTT FACILITIES, INC. High Voltage DC Power Distribution Units for AI Data Centers Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.12.5 NTT FACILITIES, INC. Recent Developments/Updates

9.12.6 NTT FACILITIES, INC. Competitive Strengths & Weaknesses

10 INDUSTRY CHAIN ANALYSIS

10.1 High Voltage DC Power Distribution Units for AI Data Centers Industry Chain

10.2 High Voltage DC Power Distribution Units for AI Data Centers Upstream Analysis

10.2.1 High Voltage DC Power Distribution Units for AI Data Centers Core Raw Materials

10.2.2 Main Manufacturers of High Voltage DC Power Distribution Units for AI Data Centers Core Raw Materials

10.3 Midstream Analysis

10.4 Downstream Analysis

10.5 High Voltage DC Power Distribution Units for AI Data Centers Production Mode

10.6 High Voltage DC Power Distribution Units for AI Data Centers Procurement Model

10.7 High Voltage DC Power Distribution Units for AI Data Centers Industry Sales Model and Sales Channels

10.7.1 High Voltage DC Power Distribution Units for AI Data Centers Sales Model

10.7.2 High Voltage DC Power Distribution Units for AI Data Centers Typical Distributors

11 RESEARCH FINDINGS AND CONCLUSION

12 APPENDIX

12.1 Methodology

12.2 Research Process and Data Source

12.3 Disclaimer

List Of Tables

LIST OF TABLES

Table 1. World High Voltage DC Power Distribution Units for AI Data Centers Production Value by Region (2021, 2025 and 2032) & (USD Million)

Table 2. World High Voltage DC Power Distribution Units for AI Data Centers Production Value by Region (2021-2026) & (USD Million)

Table 3. World High Voltage DC Power Distribution Units for AI Data Centers Production Value by Region (2027-2032) & (USD Million)

Table 4. World High Voltage DC Power Distribution Units for AI Data Centers Production Value Market Share by Region (2021-2026)

Table 5. World High Voltage DC Power Distribution Units for AI Data Centers Production Value Market Share by Region (2027-2032)

Table 6. World High Voltage DC Power Distribution Units for AI Data Centers Production by Region (2021-2026) & (Units)

Table 7. World High Voltage DC Power Distribution Units for AI Data Centers Production by Region (2027-2032) & (Units)

Table 8. World High Voltage DC Power Distribution Units for AI Data Centers Production Market Share by Region (2021-2026)

Table 9. World High Voltage DC Power Distribution Units for AI Data Centers Production Market Share by Region (2027-2032)

Table 10. World High Voltage DC Power Distribution Units for AI Data Centers Average Price by Region (2021-2026) & (US\$/Unit)

Table 11. World High Voltage DC Power Distribution Units for AI Data Centers Average Price by Region (2027-2032) & (US\$/Unit)

Table 12. High Voltage DC Power Distribution Units for AI Data Centers Major Market Trends

Table 13. World High Voltage DC Power Distribution Units for AI Data Centers Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (Units)

Table 14. World High Voltage DC Power Distribution Units for AI Data Centers Consumption by Region (2021-2026) & (Units)

Table 15. World High Voltage DC Power Distribution Units for AI Data Centers Consumption Forecast by Region (2027-2032) & (Units)

Table 16. World High Voltage DC Power Distribution Units for AI Data Centers Production Value by Manufacturer (2021-2026) & (USD Million)

Table 17. Production Value Market Share of Key High Voltage DC Power Distribution Units for AI Data Centers Producers in 2025

Table 18. World High Voltage DC Power Distribution Units for AI Data Centers

Production by Manufacturer (2021-2026) & (Units)

Table 19. Production Market Share of Key High Voltage DC Power Distribution Units for AI Data Centers Producers in 2025

Table 20. World High Voltage DC Power Distribution Units for AI Data Centers Average Price by Manufacturer (2021-2026) & (US\$/Unit)

Table 21. Global High Voltage DC Power Distribution Units for AI Data Centers Company Evaluation Quadrant

Table 22. World High Voltage DC Power Distribution Units for AI Data Centers Industry Rank of Major Manufacturers, Based on Production Value in 2025

Table 23. Head Office and High Voltage DC Power Distribution Units for AI Data Centers Production Site of Key Manufacturer

Table 24. High Voltage DC Power Distribution Units for AI Data Centers Market: Company Product Type Footprint

Table 25. High Voltage DC Power Distribution Units for AI Data Centers Market: Company Product Application Footprint

Table 26. High Voltage DC Power Distribution Units for AI Data Centers Competitive Factors

Table 27. High Voltage DC Power Distribution Units for AI Data Centers New Entrant and Capacity Expansion Plans

Table 28. High Voltage DC Power Distribution Units for AI Data Centers Mergers & Acquisitions Activity

Table 29. United States VS China High Voltage DC Power Distribution Units for AI Data Centers Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 30. United States VS China High Voltage DC Power Distribution Units for AI Data Centers Production Comparison, (2021 & 2025 & 2032) & (Units)

Table 31. United States VS China High Voltage DC Power Distribution Units for AI Data Centers Consumption Comparison, (2021 & 2025 & 2032) & (Units)

Table 32. United States Based High Voltage DC Power Distribution Units for AI Data Centers Manufacturers, Headquarters and Production Site (States, Country)

Table 33. United States Based Manufacturers High Voltage DC Power Distribution Units for AI Data Centers Production Value, (2021-2026) & (USD Million)

Table 34. United States Based Manufacturers High Voltage DC Power Distribution Units for AI Data Centers Production Value Market Share (2021-2026)

Table 35. United States Based Manufacturers High Voltage DC Power Distribution Units for AI Data Centers Production (2021-2026) & (Units)

Table 36. United States Based Manufacturers High Voltage DC Power Distribution Units for AI Data Centers Production Market Share (2021-2026)

Table 37. China Based High Voltage DC Power Distribution Units for AI Data Centers Manufacturers, Headquarters and Production Site (Province, Country)

Table 38. China Based Manufacturers High Voltage DC Power Distribution Units for AI Data Centers Production Value, (2021-2026) & (USD Million)

Table 39. China Based Manufacturers High Voltage DC Power Distribution Units for AI Data Centers Production Value Market Share (2021-2026)

Table 40. China Based Manufacturers High Voltage DC Power Distribution Units for AI Data Centers Production, (2021-2026) & (Units)

Table 41. China Based Manufacturers High Voltage DC Power Distribution Units for AI Data Centers Production Market Share (2021-2026)

Table 42. Rest of World Based High Voltage DC Power Distribution Units for AI Data Centers Manufacturers, Headquarters and Production Site (State, Country)

Table 43. Rest of World Based Manufacturers High Voltage DC Power Distribution Units for AI Data Centers Production Value, (2021-2026) & (USD Million)

Table 44. Rest of World Based Manufacturers High Voltage DC Power Distribution Units for AI Data Centers Production Value Market Share (2021-2026)

Table 45. Rest of World Based Manufacturers High Voltage DC Power Distribution Units for AI Data Centers Production, (2021-2026) & (Units)

Table 46. Rest of World Based Manufacturers High Voltage DC Power Distribution Units for AI Data Centers Production Market Share (2021-2026)

Table 47. World High Voltage DC Power Distribution Units for AI Data Centers Production Value by Rated Voltage, (USD Million), 2021 & 2025 & 2032

Table 48. World High Voltage DC Power Distribution Units for AI Data Centers Production by Rated Voltage (2021-2026) & (Units)

Table 49. World High Voltage DC Power Distribution Units for AI Data Centers Production by Rated Voltage (2027-2032) & (Units)

Table 50. World High Voltage DC Power Distribution Units for AI Data Centers Production Value by Rated Voltage (2021-2026) & (USD Million)

Table 51. World High Voltage DC Power Distribution Units for AI Data Centers Production Value by Rated Voltage (2027-2032) & (USD Million)

Table 52. World High Voltage DC Power Distribution Units for AI Data Centers Average Price by Rated Voltage (2021-2026) & (US\$/Unit)

Table 53. World High Voltage DC Power Distribution Units for AI Data Centers Average Price by Rated Voltage (2027-2032) & (US\$/Unit)

Table 54. World High Voltage DC Power Distribution Units for AI Data Centers Production Value by Output Capacity, (USD Million), 2021 & 2025 & 2032

Table 55. World High Voltage DC Power Distribution Units for AI Data Centers Production by Output Capacity (2021-2026) & (Units)

Table 56. World High Voltage DC Power Distribution Units for AI Data Centers Production by Output Capacity (2027-2032) & (Units)

Table 57. World High Voltage DC Power Distribution Units for AI Data Centers

Production Value by Output Capacity (2021-2026) & (USD Million)

Table 58. World High Voltage DC Power Distribution Units for AI Data Centers

Production Value by Output Capacity (2027-2032) & (USD Million)

Table 59. World High Voltage DC Power Distribution Units for AI Data Centers Average Price by Output Capacity (2021-2026) & (US\$/Unit)

Table 60. World High Voltage DC Power Distribution Units for AI Data Centers Average Price by Output Capacity (2027-2032) & (US\$/Unit)

Table 61. World High Voltage DC Power Distribution Units for AI Data Centers

Production Value by Installation Position, (USD Million), 2021 & 2025 & 2032

Table 62. World High Voltage DC Power Distribution Units for AI Data Centers

Production by Installation Position (2021-2026) & (Units)

Table 63. World High Voltage DC Power Distribution Units for AI Data Centers

Production by Installation Position (2027-2032) & (Units)

Table 64. World High Voltage DC Power Distribution Units for AI Data Centers

Production Value by Installation Position (2021-2026) & (USD Million)

Table 65. World High Voltage DC Power Distribution Units for AI Data Centers

Production Value by Installation Position (2027-2032) & (USD Million)

Table 66. World High Voltage DC Power Distribution Units for AI Data Centers Average Price by Installation Position (2021-2026) & (US\$/Unit)

Table 67. World High Voltage DC Power Distribution Units for AI Data Centers Average Price by Installation Position (2027-2032) & (US\$/Unit)

Table 68. World High Voltage DC Power Distribution Units for AI Data Centers

Production Value by Application, (USD Million), 2021 & 2025 & 2032

Table 69. World High Voltage DC Power Distribution Units for AI Data Centers

Production by Application (2021-2026) & (Units)

Table 70. World High Voltage DC Power Distribution Units for AI Data Centers

Production by Application (2027-2032) & (Units)

Table 71. World High Voltage DC Power Distribution Units for AI Data Centers

Production Value by Application (2021-2026) & (USD Million)

Table 72. World High Voltage DC Power Distribution Units for AI Data Centers

Production Value by Application (2027-2032) & (USD Million)

Table 73. World High Voltage DC Power Distribution Units for AI Data Centers Average Price by Application (2021-2026) & (US\$/Unit)

Table 74. World High Voltage DC Power Distribution Units for AI Data Centers Average Price by Application (2027-2032) & (US\$/Unit)

Table 75. Flex Ltd. Basic Information, Manufacturing Base and Competitors

Table 76. Flex Ltd. Major Business

Table 77. Flex Ltd. High Voltage DC Power Distribution Units for AI Data Centers Product and Services

Table 78. Flex Ltd. High Voltage DC Power Distribution Units for AI Data Centers Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 79. Flex Ltd. Recent Developments/Updates

Table 80. Flex Ltd. Competitive Strengths & Weaknesses

Table 81. Vertiv Group Corp. Basic Information, Manufacturing Base and Competitors

Table 82. Vertiv Group Corp. Major Business

Table 83. Vertiv Group Corp. High Voltage DC Power Distribution Units for AI Data Centers Product and Services

Table 84. Vertiv Group Corp. High Voltage DC Power Distribution Units for AI Data Centers Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 85. Vertiv Group Corp. Recent Developments/Updates

Table 86. Vertiv Group Corp. Competitive Strengths & Weaknesses

Table 87. ABB Ltd Basic Information, Manufacturing Base and Competitors

Table 88. ABB Ltd Major Business

Table 89. ABB Ltd High Voltage DC Power Distribution Units for AI Data Centers Product and Services

Table 90. ABB Ltd High Voltage DC Power Distribution Units for AI Data Centers Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 91. ABB Ltd Recent Developments/Updates

Table 92. ABB Ltd Competitive Strengths & Weaknesses

Table 93. Schneider Electric SE Basic Information, Manufacturing Base and Competitors

Table 94. Schneider Electric SE Major Business

Table 95. Schneider Electric SE High Voltage DC Power Distribution Units for AI Data Centers Product and Services

Table 96. Schneider Electric SE High Voltage DC Power Distribution Units for AI Data Centers Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 97. Schneider Electric SE Recent Developments/Updates

Table 98. Schneider Electric SE Competitive Strengths & Weaknesses

Table 99. Eaton Corporation plc Basic Information, Manufacturing Base and Competitors

Table 100. Eaton Corporation plc Major Business

Table 101. Eaton Corporation plc High Voltage DC Power Distribution Units for AI Data Centers Product and Services

Table 102. Eaton Corporation plc High Voltage DC Power Distribution Units for AI Data

Centers Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 103. Eaton Corporation plc Recent Developments/Updates

Table 104. Eaton Corporation plc Competitive Strengths & Weaknesses

Table 105. Delta Electronics, Inc. Basic Information, Manufacturing Base and Competitors

Table 106. Delta Electronics, Inc. Major Business

Table 107. Delta Electronics, Inc. High Voltage DC Power Distribution Units for AI Data Centers Product and Services

Table 108. Delta Electronics, Inc. High Voltage DC Power Distribution Units for AI Data Centers Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 109. Delta Electronics, Inc. Recent Developments/Updates

Table 110. Delta Electronics, Inc. Competitive Strengths & Weaknesses

Table 111. LITE-ON Technology Corporation Basic Information, Manufacturing Base and Competitors

Table 112. LITE-ON Technology Corporation Major Business

Table 113. LITE-ON Technology Corporation High Voltage DC Power Distribution Units for AI Data Centers Product and Services

Table 114. LITE-ON Technology Corporation High Voltage DC Power Distribution Units for AI Data Centers Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 115. LITE-ON Technology Corporation Recent Developments/Updates

Table 116. LITE-ON Technology Corporation Competitive Strengths & Weaknesses

Table 117. Kehua Data Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 118. Kehua Data Co., Ltd. Major Business

Table 119. Kehua Data Co., Ltd. High Voltage DC Power Distribution Units for AI Data Centers Product and Services

Table 120. Kehua Data Co., Ltd. High Voltage DC Power Distribution Units for AI Data Centers Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 121. Kehua Data Co., Ltd. Recent Developments/Updates

Table 122. Kehua Data Co., Ltd. Competitive Strengths & Weaknesses

Table 123. Hangzhou Zhongheng Electric Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 124. Hangzhou Zhongheng Electric Co., Ltd. Major Business

Table 125. Hangzhou Zhongheng Electric Co., Ltd. High Voltage DC Power Distribution Units for AI Data Centers Product and Services

Table 126. Hangzhou Zhongheng Electric Co., Ltd. High Voltage DC Power Distribution Units for AI Data Centers Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 127. Hangzhou Zhongheng Electric Co., Ltd. Recent Developments/Updates
Table 128. Hangzhou Zhongheng Electric Co., Ltd. Competitive Strengths & Weaknesses
Table 129. East Group Co., Ltd. Basic Information, Manufacturing Base and Competitors
Table 130. East Group Co., Ltd. Major Business
Table 131. East Group Co., Ltd. High Voltage DC Power Distribution Units for AI Data Centers Product and Services
Table 132. East Group Co., Ltd. High Voltage DC Power Distribution Units for AI Data Centers Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 133. East Group Co., Ltd. Recent Developments/Updates
Table 134. East Group Co., Ltd. Competitive Strengths & Weaknesses
Table 135. Huawei Digital Power Technologies Co., Ltd. Basic Information, Manufacturing Base and Competitors
Table 136. Huawei Digital Power Technologies Co., Ltd. Major Business
Table 137. Huawei Digital Power Technologies Co., Ltd. High Voltage DC Power Distribution Units for AI Data Centers Product and Services
Table 138. Huawei Digital Power Technologies Co., Ltd. High Voltage DC Power Distribution Units for AI Data Centers Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 139. Huawei Digital Power Technologies Co., Ltd. Recent Developments/Updates
Table 140. Huawei Digital Power Technologies Co., Ltd. Competitive Strengths & Weaknesses
Table 141. NTT FACILITIES, INC. Basic Information, Manufacturing Base and Competitors
Table 142. NTT FACILITIES, INC. Major Business
Table 143. NTT FACILITIES, INC. High Voltage DC Power Distribution Units for AI Data Centers Product and Services
Table 144. NTT FACILITIES, INC. High Voltage DC Power Distribution Units for AI Data Centers Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 145. NTT FACILITIES, INC. Recent Developments/Updates
Table 146. NTT FACILITIES, INC. Competitive Strengths & Weaknesses
Table 147. Global Key Players of High Voltage DC Power Distribution Units for AI Data Centers Upstream (Raw Materials)

Table 148. Global High Voltage DC Power Distribution Units for AI Data Centers Typical Customers

Table 149. High Voltage DC Power Distribution Units for AI Data Centers Typical Distributors

List Of Figures

LIST OF FIGURES

- Figure 1. High Voltage DC Power Distribution Units for AI Data Centers Picture
- Figure 2. World High Voltage DC Power Distribution Units for AI Data Centers Production Value: 2021 & 2025 & 2032, (USD Million)
- Figure 3. World High Voltage DC Power Distribution Units for AI Data Centers Production Value and Forecast (2021-2032) & (USD Million)
- Figure 4. World High Voltage DC Power Distribution Units for AI Data Centers Production (2021-2032) & (Units)
- Figure 5. World High Voltage DC Power Distribution Units for AI Data Centers Average Price (2021-2032) & (US\$/Unit)
- Figure 6. World High Voltage DC Power Distribution Units for AI Data Centers Production Value Market Share by Region (2021-2032)
- Figure 7. World High Voltage DC Power Distribution Units for AI Data Centers Production Market Share by Region (2021-2032)
- Figure 8. North America High Voltage DC Power Distribution Units for AI Data Centers Production (2021-2032) & (Units)
- Figure 9. Europe High Voltage DC Power Distribution Units for AI Data Centers Production (2021-2032) & (Units)
- Figure 10. China High Voltage DC Power Distribution Units for AI Data Centers Production (2021-2032) & (Units)
- Figure 11. Japan High Voltage DC Power Distribution Units for AI Data Centers Production (2021-2032) & (Units)
- Figure 12. South Korea High Voltage DC Power Distribution Units for AI Data Centers Production (2021-2032) & (Units)
- Figure 13. Southeast Asia High Voltage DC Power Distribution Units for AI Data Centers Production (2021-2032) & (Units)
- Figure 14. China Taiwan High Voltage DC Power Distribution Units for AI Data Centers Production (2021-2032) & (Units)
- Figure 15. High Voltage DC Power Distribution Units for AI Data Centers Market Drivers
- Figure 16. Factors Affecting Demand
- Figure 17. World High Voltage DC Power Distribution Units for AI Data Centers Consumption (2021-2032) & (Units)
- Figure 18. World High Voltage DC Power Distribution Units for AI Data Centers Consumption Market Share by Region (2021-2032)
- Figure 19. United States High Voltage DC Power Distribution Units for AI Data Centers Consumption (2021-2032) & (Units)

Figure 20. China High Voltage DC Power Distribution Units for AI Data Centers Consumption (2021-2032) & (Units)

Figure 21. Europe High Voltage DC Power Distribution Units for AI Data Centers Consumption (2021-2032) & (Units)

Figure 22. Japan High Voltage DC Power Distribution Units for AI Data Centers Consumption (2021-2032) & (Units)

Figure 23. South Korea High Voltage DC Power Distribution Units for AI Data Centers Consumption (2021-2032) & (Units)

Figure 24. ASEAN High Voltage DC Power Distribution Units for AI Data Centers Consumption (2021-2032) & (Units)

Figure 25. India High Voltage DC Power Distribution Units for AI Data Centers Consumption (2021-2032) & (Units)

Figure 26. Producer Shipments of High Voltage DC Power Distribution Units for AI Data Centers by Manufacturer Revenue (\$MM) and Market Share (%): 2025

Figure 27. Global Four-firm Concentration Ratios (CR4) for High Voltage DC Power Distribution Units for AI Data Centers Markets in 2025

Figure 28. Global Four-firm Concentration Ratios (CR8) for High Voltage DC Power Distribution Units for AI Data Centers Markets in 2025

Figure 29. United States VS China: High Voltage DC Power Distribution Units for AI Data Centers Production Value Market Share Comparison (2021 & 2025 & 2032)

Figure 30. United States VS China: High Voltage DC Power Distribution Units for AI Data Centers Production Market Share Comparison (2021 & 2025 & 2032)

Figure 31. United States VS China: High Voltage DC Power Distribution Units for AI Data Centers Consumption Market Share Comparison (2021 & 2025 & 2032)

Figure 32. United States Based Manufacturers High Voltage DC Power Distribution Units for AI Data Centers Production Market Share 2025

Figure 33. China Based Manufacturers High Voltage DC Power Distribution Units for AI Data Centers Production Market Share 2025

Figure 34. Rest of World Based Manufacturers High Voltage DC Power Distribution Units for AI Data Centers Production Market Share 2025

Figure 35. World High Voltage DC Power Distribution Units for AI Data Centers Production Value by Rated Voltage, (USD Million), 2021 & 2025 & 2032

Figure 36. World High Voltage DC Power Distribution Units for AI Data Centers Production Value Market Share by Rated Voltage in 2025

Figure 37. 240 V

Figure 38. 336 V

Figure 39. 380 V

Figure 40. 800 V

Figure 41. World High Voltage DC Power Distribution Units for AI Data Centers

Production Market Share by Rated Voltage (2021-2032)

Figure 42. World High Voltage DC Power Distribution Units for AI Data Centers

Production Value Market Share by Rated Voltage (2021-2032)

Figure 43. World High Voltage DC Power Distribution Units for AI Data Centers Average Price by Rated Voltage (2021-2032) & (US\$/Unit)

Figure 44. World High Voltage DC Power Distribution Units for AI Data Centers

Production Value by Output Capacity, (USD Million), 2021 & 2025 & 2032

Figure 45. World High Voltage DC Power Distribution Units for AI Data Centers

Production Value Market Share by Output Capacity in 2025

Figure 46. Below 100 kW

Figure 47. 100 kW to 400 kW

Figure 48. 400 kW to 1 MW

Figure 49. Above 1 MW

Figure 50. World High Voltage DC Power Distribution Units for AI Data Centers

Production Market Share by Output Capacity (2021-2032)

Figure 51. World High Voltage DC Power Distribution Units for AI Data Centers

Production Value Market Share by Output Capacity (2021-2032)

Figure 52. World High Voltage DC Power Distribution Units for AI Data Centers Average Price by Output Capacity (2021-2032) & (US\$/Unit)

Figure 53. World High Voltage DC Power Distribution Units for AI Data Centers

Production Value by Installation Position, (USD Million), 2021 & 2025 & 2032

Figure 54. World High Voltage DC Power Distribution Units for AI Data Centers

Production Value Market Share by Installation Position in 2025

Figure 55. Room

Figure 56. Row

Figure 57. Sidecar

Figure 58. Rack

Figure 59. World High Voltage DC Power Distribution Units for AI Data Centers

Production Market Share by Installation Position (2021-2032)

Figure 60. World High Voltage DC Power Distribution Units for AI Data Centers

Production Value Market Share by Installation Position (2021-2032)

Figure 61. World High Voltage DC Power Distribution Units for AI Data Centers Average Price by Installation Position (2021-2032) & (US\$/Unit)

Figure 62. World High Voltage DC Power Distribution Units for AI Data Centers

Production Value by Application, (USD Million), 2021 & 2025 & 2032

Figure 63. World High Voltage DC Power Distribution Units for AI Data Centers

Production Value Market Share by Application in 2025

Figure 64. AI Training Cluster Power Supply

Figure 65. AI Inference Cluster Power Supply

Figure 66. Cloud Data Center Power Supply

Figure 67. Telecom Equipment Room Power Supply

Figure 68. Others

Figure 69. World High Voltage DC Power Distribution Units for AI Data Centers
Production Market Share by Application (2021-2032)

Figure 70. World High Voltage DC Power Distribution Units for AI Data Centers
Production Value Market Share by Application (2021-2032)

Figure 71. World High Voltage DC Power Distribution Units for AI Data Centers Average
Price by Application (2021-2032) & (US\$/Unit)

Figure 72. High Voltage DC Power Distribution Units for AI Data Centers Industry Chain

Figure 73. High Voltage DC Power Distribution Units for AI Data Centers Procurement
Model

Figure 74. High Voltage DC Power Distribution Units for AI Data Centers Sales Model

Figure 75. High Voltage DC Power Distribution Units for AI Data Centers Sales
Channels, Direct Sales, and Distribution

Figure 76. Methodology

Figure 77. Research Process and Data Source

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